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ABSTRACT

To assist work adjustors, evaluators, and counselors in learning how to write individualized work adjustment plans, this publication describes one method of developing individual client plans--the Materials Development Center Individualized Work Adjustment Plan. The detailed description of this plan explains the two basic parts of its format: (1) "page 1," on which are listed and prioritized problem behaviors or skill deficits, and (2) the individual goal sheets which set forth each behavior to be worked with in the adjustment program. Suggestions for using the form, sample forms, and example plans are provided. Appended materials include a work adjustment program evaluation checklist and a simulated discussion between the director of client services and a rehabilitation consultant; the discussion describes the adjustment plan's purpose, identifies problems in implementing work adjustment services, demonstrates steps in developing individualized plans, and emphasizes the need for a written plan for each client. (YLB)

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Individualized Client Planning for Work Adjustment Services

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Work adjustment personnel who have techniques or methods for developing individualized work adjustment plans are invited to submit their materials to the MDC for consideration for distribution to the field. The MDC would also like to receive feedback regarding:

1) Suggestions for improving the current MDC Individualized Work Adjustment Plan Form;
2) Examples of individual plans developed according to the MDC form;
3) Other forms or outlines for developing individualized work adjustment plans.

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WORK ADJUSTMENT AND THE CARF STANDARDS

Recently, there has been an increased emphasis on accountability in the human services delivery system. Vocational rehabilitation, as part of this system, has also experienced increased demand from legislators, citizen's groups, and consumers to be accountable for the services which it provides as well as for the funds which are expended for this purpose. Consumer groups in particular have become more insistent in requesting an expanded role for their own participation in the delivery of rehabilitation services. Whatever the case may be, it is obvious to all parties concerned that accountability is more than a passing phase that has to be endured for the present. Although accountability and the program evaluation process may be threatening to many agencies and professionals, a majority have recognized that the system will benefit because of it in the long run.

Vocational rehabilitation has had a head start over some other programs in the human service delivery system as evidenced by the existence of the Commission on Accreditation of Rehabilitation Facilities. Since 1966, CARF has attempted to establish standards in order to recognize those facilities which consistently offer high quality services to their clients. CARF itself has foreseen the need to examine and upgrade the standards by which it certifies the programs offered by individual facilities. In revising the standards directly related to vocational adjustment, CARF sought the advice and recommendations of the Vocational Evaluation and Work Adjustment Association. The 1975 revisions to the "Standards Manual for Rehabilitation Facilities" are a direct result of this endeavor. Prior to the present revisions, the CARF standards did not mention the need for a specific, written work

adjustment plan for each client. However, according to the 1975 revisions, those facilities which offer work adjustment services must prepare an individualized written plan which specifies: a) the behaviors to be worked with; b) the methods and techniques being used; c) the persons involved in implementing the plan and their respective responsibilities; d) the work assignments or environment where the plan is to be implemented; e) a method for reviewing and evaluating the plan should also be included.

The state vocational rehabilitation agency has the primary responsibility for the delivery of rehabilitation services in each state. The Rehabilitation Act of 1973 mandates that an individualized rehabilitation program be developed jointly by the counselor and the client. More and more state agencies are recognizing the CARF standards as providing an existing vehicle for establishing program accountability for both state-operated facilities and private agencies from which services are purchased. As a result, an increasing number of rehabilitation centers and workshops will be expected to meet the CARF certification standards for work adjustment programs. This, of course, includes the development of written, individualized work adjustment plans as an essential part of work adjustment programming.

THE INDIVIDUALIZED WORK ADJUSTMENT PLAN

In order to provide effective work adjustment services, rehabilitation centers and workshops must offer a program which is designed to assist each person in acquiring the skills and behaviors necessary in order to find and maintain employment. This employment should be work which the individual can perform to the satisfaction of the employer, but which is also personally satisfying to him or her as an individual. Since people are all different, it stands to reason that all persons in need of work adjustment will not benefit from the same program of services. Not only do people differ, but their problems are often unique to the individual. Even when the problems or behaviors of two persons appear to be relatively similar, the methods and techniques used to assist each individual in correcting his or her problem behaviors will vary according to the needs of that individual. Thus, work adjustment should be an individually-designed program which is "tailor-made" in order to help each client achieve his or her own goals and objectives.

In order to reach this goal of individualized work adjustment programming, the staff, together with the client, must be able to describe in writing the behaviors which prohibit the individual from achieving his or her job goal, as well as the program of action to be used in correcting these behaviors. This written program then becomes the adjustment plan for that particular individual, or a "blueprint" for the work adjustment program. As a result of the establishment of a written, individualized adjustment plan, all of the participants in the process should know specifically which behaviors or problems are being dealt with, the objectives and goals which are to be accomplished, and

the techniques, methods, and procedures which are to be used in accomplishing the necessary changes.

The Individualized Work Adjustment Plan Form

In order to assist work adjustors, evaluators, and counselors in learning how to write individualized work adjustment plans, the staff of the Materials Development Center has produced this publication which describes one method of developing individual client plans. The form is designed to assist staff members in structuring each client's work adjustment program as a result of writing out all elements of the prescriptive adjustment program as clearly and specifically as possible. The concepts which the form has been designed to illustrate are of far greater significance than the form itself. Work adjustors may find another way of organizing this information which is easier to use or more meaningful to their particular program. However, the majority of the concepts which the MDC form attempts to convey are essential to successful work adjustment programming.

The MDC Individualized Work Adjustment Plan consists of two basic parts. The first part, or page one, is designed to assist the evaluator, counselor, or work adjustor in identifying and describing the specific problem behaviors or skill deficits which are to be dealt with in work adjustment. This is accomplished by using principles of behavior observation and identification as described in the MDC Behavior Identification Format. Because work adjustment is essentially a behavior change or acquisition process, the identification of problem behaviors and skill deficits is crucial to effective work adjustment programming. Page one of the form is also designed to assist work adjustment personnel in determining priorities in cases where a number of problem

areas exist, or in other words, which behaviors are really important to the client in order to achieve his or her job goal. The staff and the client will want to direct their attention to those areas which are most limiting to the client, as well as to those where the possibility of change is greatest. When a number of problem behaviors or deficits exist, the staff may have to concentrate on one or two behaviors judged to be most important before attempting to deal with others.

The second part of the form consists of the individual goal sheet or sheets. There should be an individual goal sheet for each behavior which is going to be worked with in the adjustment program. It should be emphasized that the staff will want to concentrate on those behaviors considered as being most detrimental to the client. The individual goal sheet is designed to lay out for all to see the program which is to be used to correct or modify the specific behavior or skill deficit which has been previously identified as interfering with the client's ability to find and maintain employment. The first part represents the behavior identification phase of the individualized adjustment plan, and the second part, or individual goal sheet, is the implementation phase of the adjustment plan. Both are equally important in establishing a viable, effective individualized work adjustment plan.

A Description of the MDC Individualized Work Adjustment Plan Form

In reading this section, refer to the numbered example on pages 13 and 15.

Page one (1) of the form contains three basic features or sections. At the top of the page is found identifying information about the client. This can include whatever information is desired by the particular agency. There is a space provided for indicating what has

been arbitrarily labeled as the "Work Adjustment Coordinator" (1a) . In this space, the name of the person who is responsible for coordinating the client's program should be recorded. Although there may be a number of persons who are to be involved in the implementation of the work adjustment plan, one individual should have primary responsibility for each client's plan. This is helpful in order to minimize confusion when a number of people are working with the same client. In addition, one person has the responsibility for insuring that the work adjustment plan is implemented as it is written. This person also has to be responsible for seeing to it that all involved persons are carrying out their responsibilities as specified in the plan, as well as for evaluating the plan's effectiveness. Although adjustment is definitely a team or group process, one person should be responsible for coordinating each client's program.

Left Column, Page One

On the left side of page one, space is provided for describing the specific behavior problems or skill deficits which have been identified during the evaluation process (1b) . There should be general agreement between staff members as to the nature of the behavior or skill deficit before it is written down. It should be written in such a way so that the staff agrees that this indeed is the problem. For a client who has difficulty getting to work on time, the behavior might be simply stated as, "Arrives late for work." If starting time is at 8:00 a.m., there can be little disagreement about the nature of the problem if the client continually arrives at twenty minutes past the hour. In addition to identifying and describing the behavior, staff insights into the reasons for the behavior are valuable in understanding the behavior and

in developing a plan to assist the client in correcting it. For example, the client who is regularly late for work may not have public transportation available which allows him or her to arrive on time. If parents are providing transportation, they may not be responsible in getting their son or daughter to work by the designated starting time. The client may also rely on his parents to awaken him in the morning, and in such a case, may benefit from learning to use an alarm clock independently. Insights such as these should be recorded as part of the behavior description.

Space is also provided on the form for recording the frequency with which the particular behavior occurs (1c) . The frequency count may be expressed as an actual tally of the number of times a particular behavior occurs, or as a percentage of time during which the behavior does or does not occur. For example, Charlie was more than 15 minutes late for work six times during his first two weeks in the program, or Samantha averaged 40% of her time looking around the shop while working on deadbolt lock assemblies. For more serious behaviors, each occurrence should be counted individually. Ideally, this initial frequency count should be obtained over a period of several days if it is to serve as a baseline by which to compare change resulting from the behavior change or work adjustment program. Usually, an accurate baseline for a particular behavior can be obtained during the evaluation period which should precede work adjustment. In cases where a vocational evaluation does not immediately precede work adjustment, the first few days may have to be spent in gathering baseline information about a particular behavior. In any event, by comparing the frequency with which a behavior occurs before and after the work adjustment plan is implemented, the staff and the client can determine if progress is being made.

Right Column, Page One

The right side of page one is designed to assist the work adjustment staff and the client in determining priorities for the work adjustment program (1d) . As discussed previously, when a client has a number of problem areas, those which are considered most important or limiting to the client should receive the most emphasis in program planning. In determining the significance of a particular behavior, a basic question to consider is whether or not the behavior would be tolerated by an employer and co-workers in a "normal" employment setting. If "yes," then the behavior really will not have to be dealt with in work adjustment. If the response is negative or "no," then you have most likely identified a priority area. The "sometimes" or "maybe" responses represent somewhat of a "gray area," and call for close examination. Behaviors in this category most likely will require change, or the client may have to be selectively placed in a job where the behavior does not interfere with his or her performance. The "change necessary" and "change helpful" columns on the extreme right side of page one are designed to assist work adjustment personnel in making these determinations (1e) . Those behaviors marked in the "change necessary" column will have to be changed or modified if the person is to be employable. Those behaviors checked as "change helpful" may not be crucial to the individual's eventual employability; however, change may enhance that person's prospects for finding and maintaining employment.

The Individual Goal Sheet (2)

The Individual Goal Sheet is designed to provide structure to the client's work adjustment or behavior change program. There should be

a goal sheet for each behavior which has already been identified as representing a priority item. Staff members may also choose to develop a goal sheet for all behaviors, critical and noncritical alike, that are to be worked with in work adjustment.

(2a) Behavior: The problem behavior or skill deficit, along with accompanying insights regarding the behavior, are rewritten exactly as they appear on page one. This is necessary for consistency in plan implementation.

(2b) Goal: The goal relating to the above listed behavior in many cases will be the exact opposite of that behavior. Using a previous example, if the behavior has been identified as "Arrives late for work," the long-term goal might be stated as, "Arrive at work by 7:55 a.m. consistently." The goal should be stated in behavioral terms, and it should specifically list what the client will be doing when the goal is achieved. In many instances, the client may have to accomplish certain intermediate objectives in order to attain the goal. Again using the above example, in order to arrive at work on time, the client may have to learn how to tell time correctly, may have to be taught how to use an alarm clock properly, or may have to learn how to make use of existing transportation. Any intermediate objectives should be listed immediately below the goal, and once again should be stated as specifically as possible (2c). Some more complex intermediate objectives may actually represent goals in themselves, and in that case should be listed on a separate goal sheet.

(2d) Client Response: In order to have the greatest possibility for success, the work adjustment plan should be developed jointly

by the staff and the client. The client should be given the opportunity to have input into the plan before it is actually implemented. Does the client see this particular behavior as representing a problem? Is he or she willing to work on changing the behavior? What is the client's reaction to the staff's suggestions for changing his or her behavior? If the client does not see this particular behavior as presenting a problem, or is unwilling to change, then efforts directed at change may be of minimal value. However, some indication of the client's reaction to and involvement with this segment of the work adjustment plan should be recorded on the Individual Goal Sheet.

(2e) Methods and Techniques: The methods and techniques to be used in assisting the client to achieve his or her goal should be listed on this section of the goal sheet. This should include the listing of any and all techniques to be used for this particular goal. Some of the techniques commonly used in work adjustment programs include behavior modification, token rewards, modeling, individual and group instruction in grooming, money-handling, transportation, etc., and various forms of individual and group counseling. A more detailed explanation of the manner in which a specific technique will be utilized should be provided in the procedure section below.

(2f) Materials Needed: Some plans may require the use of various resource and/or instructional materials. Grooming aids provide an example of instructional materials commonly used in work adjustment programs. Such materials should be listed as specifically as possible, i.e., shampoo, hair dryer, blow comb,

combs, brushes, etc. When using films or filmstrips, the title or titles should be listed.

(2g) Procedure: This undoubtedly is the most important section on the Individual Goal Sheet. It is here that the staff spells out in a series of statements just exactly what is to take place in the implementation of the plan. For example, "George is to meet with Mr. Smith for individual counseling Monday, Wednesday, and Friday at 3:00 p.m. George's production average for the previous day will be reviewed and charted on the graph. Mr. Smith will praise George for meeting the production quota of sixty percent of the industrial rate. George will be encouraged to offer insights into his own behavior, as well as to bring up other matters which he may wish to discuss." In addition to specifying "what" is to take place, the specific location in which the activity is to take place should be provided, such as a particular work station, area of the building, e.g., the lunchroom or community job site. The work assignment should be consistent with the goals of the individual. The names and responsibilities of all persons involved in this phase of the plan should also be listed. The "what," "where," and "who" labels which are positioned horizontally across the page are not meant to indicate columns under which this information is to be written. Rather, these terms are "cues" or reminders as to the information which is to be included in this section of the form. It is extremely important that the procedure be written out as clearly and in as much detail as possible. If there is not sufficient space on the form, the reverse side of the goal sheet can be used. The

procedure should be understood and agreed to by all involved persons. It is the work adjustment coordinator's responsibility to insure that this is indeed the case. If the participants do not understand and support the plan, then the possibility for problems in implementation are increased.

(2h) Progress Check Points: The progress check points serve as a built-in mechanism for evaluating the effectiveness of the work adjustment plan. The dates for these check points can be predetermined at the time the plan is written (2i) . Because the plan is structured, specific, and written so that it is understood by everyone, the staff is in the position to better determine the effectiveness of the plan at any given point in time. This is one of the major advantages resulting from the utilization of a written, individualized work adjustment plan.

At the various progress check points, a frequency count of the behavior should again be obtained (2j) . This can be compared to the previous frequency count or to the baseline in order to determine the rate and level of the client's achievement. The adjustment staff as well as the client can then see if the plan is helping the client to progress as expected (2k) . If not, the plan should be revised accordingly and written on a new goal sheet (2l) .

(1)

INDIVIDUALIZED WORK ADJUSTMENT PLAN

Client's Name _____ D.O.B. _____ Case # _____

Address _____ Soc. Sec. _____ Voc. Eval. Dates _____ to _____

_____ Staffing Date _____

_____ Referring Person _____

(1a) → Work Adjustment Coordinator _____

Specific Behavior or Skill Deficit Frequency	Significance for Employment Rationale	Change Necessary	Change Helpful
1. (1b) (1c)	1. (1d)	(1e)	
2.	2.		
3.	3.		
4.	4.		
5.	5.		

(2)

Individual Goal Sheet

Behavior: (2a)

Goal: (2b)

Intermediate Objectives
1.
2. (2c)
3.

Client Response:

(2d)

Methods and Techniques:

(2e)

Materials Needed: (2f)

Procedure: What Where Who

(2g)

(2h)

Progress Check Points

Date (2i)	Frequency (2j)	(2k) Achieving Objective Yes	Achieving Objective No	(2l) Program Change Yes	Program Change No

Suggestions for Using the Form

A typical initial reaction to the Individualized Work Adjustment Plan is likely to be that it sounds like a great deal of additional work. In the beginning, there may even be some validity to this objection. Like any new technique or tool, development of written work adjustment plans will take some getting used to. However, the alternative is to continue providing work adjustment services on a haphazard, "hit-or-miss" basis. Although the development of individualized plans may initially require some additional work, the benefits resulting from this effort should soon become apparent. The use of written, individualized adjustment plans will enable facility personnel to determine how effective their work adjustment services really are. Services to clients should improve as a result of using individualized programming based on behavior identification and specific goals and techniques. The establishment of written plans should lead to improvements in program evaluation and accountability. Rather than talking in vague generalities, members of the work adjustment staff will be able to discuss individualized programs in terms of specific behaviors, goals, work assignments, techniques, etc. However, the primary benefactor should be the direct consumer of work adjustment services, the client.

How does one go about developing written, individualized work adjustment plans? Perhaps one of the best ways to proceed is by using evaluation or client staffing sessions for this purpose. It is during the evaluation staffing particularly that a plan should be formulated for work adjustment services. By using a form such as the MDC form, the staff should find the structure provided by this or a similar form facilitating to the design of individualized plans. Development of adjustment plans should be a group process, and the framework of the

form provides a basis for group discussion. In addition, communication between members of the adjustment staff and the client should also improve because the client will know specifically what his or her work adjustment program consists of. Because of the advantages which result from the establishment of specific goals and objectives, techniques and work assignments, and realistic time lines, both staff and client alike should be motivated to accomplish the changes which have been designated.

Initially, the staff should probably experiment with the MDC form in order to determine its feasibility for use with their clients and program. As already referred to, there is nothing sacred about the form itself. If people find a more convenient or practical way to accomplish the objectives for which the form has been designed, then the purposes of this publication have been accomplished. It is through use and revision that the form will become most useful to work adjustment personnel. In its present form, it represents only a beginning towards achieving the goal of individualized work adjustment programming. It should be remembered that any form is only as "good" or valuable as the people who are using it are competent in their work as rehabilitation professionals.

Sample Plans:

The following plans are examples of one way in which the Individualized Work Adjustment Plan form may be used. These examples are in no way meant to represent "model" plans as such; rather they are examples which illustrate an application of the form in one particular setting. Hopefully, these examples serve to illustrate the specific

nature of the planning which is the prerequisite for successful work adjustment and behavior change programs.

The MDC expresses its appreciation to Charlie Russell, Director of Vocational Services, and the staff of the Adult Vocational Services Unit, Platte Valley Office of Mental Retardation, Columbus, Nebraska, for their cooperation in developing the following sample plans.

INDIVIDUALIZED WORK ADJUSTMENT PLAN

Client's Name *Mike ---* D.O.B. _____ Case # _____
Address _____ Soc. Sec. _____ Voc. Eval. Dates _____ to _____
_____ Staffing Date _____
_____ Referring Person _____
Work Adjustment Coordinator *Don ---*

Specific Behavior or Skill Deficit Frequency	Significance for Employment	Change Necessary	Change Helpful
1. *Stands outside the building; will not come to his work station without being coaxed.*	Rationale 1. *Mike cannot be worked with until he at least comes into the building.*	✓	
2. *Leaves work station to go outside or wander around building.*	2. *He has to learn to stick with a task for a designated time period.*	✓	
3. *Shakes his hands up and down in fast, nervous manner.*	3. *Appear more appropriate to others.*		✓
4. *Talks to himself.*	4. " "		✓
5.	5.		

Individual Goal Sheet

Behavior: *Stands outside the building.*

Goal: *Mike will come into the building and report to his work station on time.*

Intermediate Objectives
1.
2.
3.

Client Response:

Methods and Techniques:

Behavior modification, counseling

Materials Needed:

Key to the tool room

Procedure: **What** **Where** **Who**

1. *Mike will be given a key to the tool room and the accompanying responsibility for opening it every morning. During previous program, this was effective 18 out of 20 days.*

2. *Possession of the key is contingent on reporting to his work station on time the previous day. If he fails to report directly, he will have to surrender the key to Don or another specified person.*

3. *No one is to talk with Mike until he reports to the work station. Everyone should respond with a statement like, "Mike, you should be at work," and nothing further.*

4. *Don will counsel Mike at the work station if he wants to talk when he arrives. He will be praised for reporting on time.*

5. *If Mike fails to report inside, Don will look for him after 15 minutes, but Mike loses the key for a day.*

Progress Check Points

Date	Frequency	Achieving Objective		Program Change	
		Yes	No	Yes	No
1st week	_____	___	___	___	___
2nd week	_____	___	___	___	___
3rd week	_____	___	___	___	___
4th week	_____	___	___	___	___

Individual Goal Sheet

Behavior: *Leaves work station to go outside or wander around building.*

Goal: *Mike will remain at his work station during the day.*

Intermediate Objectives

1.
2.
3. } *Mike will remain at his work station for progressively longer periods of time.*

Client Response:

Methods and Techniques:

Behavior modification

Materials Needed:

Procedure: **What** **Where** **Who**

1. *Establish baseline to determine how long he remains at his work station before leaving.*
2. *Start with amount of time that he can easily achieve based on baseline data.*
3. *Allow five minute break to do whatever he wants for staying at the job for specified time (possibly to listen to radio in counselor's office).*
4. *Gradually increase the amount of time spent at the work station every 2 or 3 days at first, in 15-30 minute intervals.*
5. *Provide graphic picture of increased time spent on job so that Mike can see his progress. Include increased output and wages.*
6. *Eventual goal is a kitchen tryout for remaining at the job for the entire day.*

Progress Check Points

Date	Frequency	Achieving Objective		Program Change	
		Yes	No	Yes	No
1st week	_____	___	___	___	___
2nd week	_____	___	___	___	___
3rd week	_____	___	___	___	___
4th week	_____	___	___	___	___

INDIVIDUALIZED WORK ADJUSTMENT PLAN

Client's Name *Kathy ---* D.O.B. _____ Case # _____
Address _____ Soc. Sec. _____ Voc. Eval. Dates _____ to _____
_____ Staffing Date _____
_____ Referring Person _____
Work Adjustment Coordinator *Dorothy ---*

Specific Behavior or Skill Deficit Frequency	Significance for Employment	Change Necessary	Change Helpful
1. *Refuses to take her medication when given to her; attempts to manipulate staff into trying to get her to take her pill.*	Rationale 1. *Requires excessive amount of supervisory attention and energy.*	✓	
2. *Refuses to punch in, go to class; hides from staff, goes outside. (All behaviors appear to be related to getting attention from staff, i.e. "catch me if you can.")*	2. *Seeks more attention than is ordinarily available or desirable.*	✓	
3.	3.		
4.	4.		
5.	5.		

Individual Goal Sheet

Behavior: *Refuses to take her pill at the required time.*

Goal: *Take her own medication at appropriate time.*

Intermediate Objectives

1. *Bring pill to Dorothy first thing in morning, report to Dorothy at*
2. *12:30 p.m.; take pill in front of Dorothy.*
3. *Keep pill on person, report to Dorothy at 12:30 and take pill. Keep pill and take by herself at 12:30.*

Client Response:

Methods and Techniques:

Counseling with Dorothy, verbal praise, token reward

Materials Needed:

Chart, tokens or stars

Procedure: **What** **Where** **Who**

Since most of Kathy's behaviors appear designed to gain the staff's attention, the following program will be used to minimize all attention-seeking behaviors. Dorothy will make up a small chart for Kathy to carry on her person (possibly in a small notebook). The chart will list the behaviors expected of Kathy:

1. *Give pill to Dorothy first thing in morning.*
2. *Punch time clock, begin work.*
3. *Go to gross motor class on time.*
4. *Take pill at 12:30.*
5. *Go to 1:30 class on time.*
6. *Go to 2:30 class on time.*

Dorothy will explain the chart and expected behaviors to Kathy. Stars will be placed on chart for successful performance of each behavior on a daily basis. For each five stars, she will earn a token which can be exchanged for additional time with Dorothy, additional reading time, or money.

The staff should avoid chasing Kathy around the building or outside as long as they know where she is. She is now responsible for her own behavior if she wants to earn the stars and tokens. The staff should stress to Kathy that she is expected to behave as an adult.

Progress Check Points

Date	Frequency	Achieving Objective		Program Change	
		Yes	No	Yes	No
_____	_____	___	___	___	___
_____	_____	___	___	___	___
_____	_____	___	___	___	___
_____	_____	___	___	___	___

Work Adjustment Program Evaluation Checklist

The following questions should assist work adjustment personnel in evaluating their own work adjustment programs, as well as in pinpointing key areas in work adjustment plan development:

	Yes	No
1. Does your agency currently have a written, individualized work adjustment plan for each person entering the work adjustment program?	___	___
2. Is the individual plan developed as a result of a team approach?	___	___
3. Is the client involved in the process of developing his or her own plan?	___	___
4. Does one person have primary responsibility for directing and implementing the agency's work adjustment program?	___	___
5. Is a staff person assigned responsibility for coordinating each client's plan?	___	___
6. Are the goals and objectives based on observable behaviors and skill deficits?	___	___
7. Are goals and objectives themselves stated in observable terms so that all persons know what the client will be expected to be doing when the goal is achieved?	___	___
8. Are the goals and objectives relevant and necessary for the client in order to reach his or her vocational goal?	___	___
9. Are the goals and objectives meaningful to the client?	___	___
10. When a number of problem behaviors have been identified, are priorities clearly established in the plan?	___	___
11. Is the plan reviewed with and clearly explained to the client, both initially and at regular intervals?	___	___
12. Are the methods and techniques which are to be used in assisting the client to achieve his or her objectives specifically identified?	___	___
13. Are resource and training materials, i.e., grooming products, films, printed materials, identified by brand name, type, title or other specific information?	___	___
14. Is the procedure for implementing the plan clearly explained so that it is understood by all persons involved?	___	___

15. Are the location or locations where the plan is to be carried out specifically identified, i.e., cafeteria, woodshop, one-handed pretzel assembly? ___ ___

16. Have the responsibilities of all involved persons been clearly spelled out? ___ ___

17. Is a mechanism or program provided for evaluating the effectiveness of the work adjustment plan? ___ ___

18. Are time deadlines for achieving the objectives established and adhered to? ___ ___

19. Are regular meetings or staffings held for reviewing the plan? Does the client participate in these meetings? ___ ___

20. Are regular work adjustment reports prepared which are entered into the client's case folder? ___ ___

A WORK ADJUSTMENT "MELLOW" DRAMA:
DEVELOPING AN INDIVIDUALIZED PLAN FOR WORK ADJUSTMENT

Introduction:

The following simulated discussion between the director of client services and a rehabilitation consultant takes place in a "typical" facility or rehabilitation workshop. The director of client services expresses concern over the lack of client success in the agency's work adjustment program. The consultant proceeds to assist the director in analyzing the problem, and in reviewing the steps and procedures necessary in order to develop a successful individualized plan for work adjustment services.

The primary purpose of this material is fourfold: 1) To describe the purpose of the adjustment plan; 2) To identify some of the problems inherent in implementing work adjustment services; 3) To demonstrate the steps involved in developing an individualized plan for work adjustment; 4) To emphasize the need for a written plan for each client in changing and improving behaviors and/or skill deficits which limit the individual's vocational potential. Some of the topics included in this discussion are:

- Identification, description, and analysis of client behaviors as the basis of a successful work adjustment plan
- Obtaining frequency counts and the baseline of behavior
- Establishing priorities and individualized behavioral objectives
- Client involvement
- The need for describing specific adjustment techniques, services, and work assignments to be used in meeting the objectives
- Establishing staff responsibilities and a time line for achieving client objectives
- Evaluation of program effectiveness in achieving individual client objectives

1 Director to Consultant (Hereafter D): As I said on the phone, I want to talk with you about our work adjustment program. I think that we provide a good vocational evaluation, but our success rate in work adjustment training doesn't seem to be as high as it should, or it takes so long to see results. I'm afraid some of the VR counselors and other referring agencies are beginning to wonder what we are doing with their clients.

2 Consultant (Hereafter C): You certainly don't want to damage your relationship with VR, but more importantly, you want to give the clients the best possible services that you can. However, I am not sure I quite understand. Tell me more about this problem!

3 (D:) As you know, most of our clients who complete evaluation stay on here for a period of work adjustment training. We think we know what their assets and problems are, but once they enter work adjustment, they just seem to float around. In fact, the behavior of some actually gets worse, and this especially concerns me.

4 (C:) I can understand that it would! How often does this happen?

5 (D:) Well, some people progress as we expect them to, but others appear to get worse right before our eyes. It seems to be happening more often, and it is very discouraging.

6 (C:) I imagine it is. Can you give me a specific example of a client this has happened to?

7 (D:) I could give you all kinds of examples. but one young woman comes particularly to mind. When we had her evaluation staffing, everyone agreed that she was immature and not very motivated, but we thought that she would change with exposure to the work environment. Instead she has gotten worse.

8 (C:) What do you mean? How has she gotten worse?

9 (D:) Well, she fools around a lot, acting funny, and the other clients laugh at her, giving her a lot of attention for her behavior. She also manipulates the other clients into doing things which get them into trouble. She is receiving a great deal of attention for her inappropriate behavior. She is also a negative influence on those working around her because they see her getting away with things. Frankly, we don't know what to do with her, and counseling hasn't helped up to this point.

10 (C:) She certainly sounds like she's got you in a bind. Was her behavior like this during the evaluation period?

11 (D:) To a certain extent, but it wasn't as bad as it is now.

12 (C:) What were her goals for work adjustment training?

13 (D:) Well, we just thought that with exposure to a realistic work setting, she would improve and we could begin working on job placement.

14 (C:) Yes, but what were the specific objectives that you expected her to accomplish as a result of work adjustment?

15 (D:) Other than what I've already told you, I can't think of anything else. It just seems like we should be able to do something other than just floundering around.

16 (C:) I think I can see some reasons for the problems you're having, not only with this client, but possibly with other clients as well. What do you think you might have done differently in this case?

17 (D:) Well, it seems like we should have something specific to work on so we know what we are doing with each individual.

18 (C:) Exactly! What you are talking about is the adjustment plan! After all, why do you recommend work adjustment services for someone in the first place?

19 (D:) Well, usually it's because the person has poor work habits, lack of basic work skills, behavior problems or a combination of all of these. Because of this, the person isn't ready to go into a job in the community, or in some cases, even into the sheltered workshop.

20 (C:) But each person's problems are different, isn't that right?

21 (D:) Yes, but we seem to do the same things for everyone regardless. For some it works, and for others, it doesn't.

22 (C:) It sounds like what you need is an individualized program designed to meet the needs of each person; a plan which specifies what it is that the client should accomplish as a result of work adjustment. Think of it as kind of like a builder's blueprint. Each one is different according to even the smallest changes in specifications. You can imagine what would happen in building a house without one.

23 (D:) I see what you mean, but it seems so complicated to think about setting up a program for each individual when we can't handle what we've got now.

24 (C:) It might be difficult at first, but by using certain techniques and procedures, I think you would find yourself saving a great deal of time and energy. Not only that,

wouldn't improved results with your clients be worth a little additional work initially?

25 (D:) It certainly would. It's pretty obvious that we have to do something. It's our job to assist the clients in correcting those problems that are keeping them from being productive.

26 (C:) Right. Since each person enters work adjustment because of problem behaviors or lack of skills, it stands to reason that something has to be changed or improved before he or she is ready to get a job or enter a training program. However, before you can change a behavior, you have to identify what it is that you and the client want to change. This is done during evaluation. Because no two people are exactly alike, your program should be designed to assist each person achieve his or her own objectives.

27 (D:) I thought we were doing that, but I guess maybe we're not.

28 (C:) According to your example, in a very general way, you are. But how do you set up a program to change things like lack of motivation and immaturity?

29 (D:) To tell you the truth, I don't know, and this is what is so frustrating.

30 (C:) What are the things which indicate that a person is not motivated? What does that individual do or how does he or she act? Before you can set up a plan to change a behavior, you have to identify and describe what it is you're trying to change.

31 (D:) Now I am beginning to understand what you're getting at. In other words, terms like "unmotivated" and "immature" don't tell you much about the person.

32 (C:) That's right, and they make it difficult to accomplish much right from the start. How can you deal with them? The first step in setting up an individualized adjustment plan is to identify and describe specific behaviors in observable terms.

33 (D:) What do you mean by "observable" terms?

34 (C:) I mean describe the behavior so that someone else could easily recognize the same behavior if and when it occurs. One way to do this is by using verbs which indicate activity or action. Words like "talks," "yells," "crys," "lays," "drops" and "gets up" all indicate activity. These are things which you can see and hear.

35 (D:) I guess it's pretty hard to see something like "lack of motivation" unless you describe what the person actually does which shows that he isn't motivated.

36 (C:) Not only that, but "lack of motivation" can mean a lot of different things to different people. Getting back to your client, what are some of the things that she does?

37 (D:) Well, she is usually 15 minutes to a half-hour late for work everyday; she returns to her work station late after breaks and lunch periods; she leaves her work station without permission several times during the day; she talks constantly with her co-workers; she fools around a lot, making faces, throwing things, and generally distracting those around her.

38 (C:) All of these things may not indicate "lack of motivation." However, the point is that once you have identified her behavior in observable terms, you are in a position to begin doing something about it. What do you think should be next?

39 (D:) I suppose now we could set up some adjustment training objectives for her.

40 (C:) Well, that's one of the things you will need to do. The important point is to determine which of the identified behaviors are really important - that is, which ones are most likely to keep the individual from finding and keeping a job.

41 (D:) In other words, you have to establish priorities.

42 (C:) That's right. You have to decide which behaviors you are going to concentrate on during work adjustment. By observing and counting the frequency with which a particular behavior occurs, you should be able to get a pretty accurate idea. However some behaviors can occur once or twice and present a major problem; others can occur frequently and still not be so serious.

43 (D:) This eliminates a lot of the guesswork and subjective judgment, but isn't it awfully time consuming?

44 (C:) At first, it may take some extra time until you get used to it, but it's essential to setting up an individualized adjustment plan. By obtaining a frequency count, you can establish a baseline for the behavior from which you can start. Once you begin implementing the plan, you should obtain periodic frequency counts, and by comparing these to the baseline, you can determine whether or not your plan is helping the client to make the necessary changes. If not, you can revise your plan.

Discussion Questions:

What are some of the problems your agency is experiencing in work adjustment? Are your clients progressing as you think they should? How do you describe client problems and behaviors? What kinds of training objectives do you have for your clients? Do you have written objectives for each client? Would someone else be able to implement your objectives in your absence? Do you have priorities for your clients? Can you describe your clients without using words like "unmotivated," "poor self-concept," etc.?

45 (D:) We've talked about the importance of identifying and describing client behaviors during evaluation, and the need to obtain a frequency count in order to establish a baseline. I imagine now we can establish the goals and objectives for the client's adjustment plan.

46 (C:) Before going further, there is something very important we should talk about, and that's client participation in developing the adjustment plan.

47 (D:) I didn't even think of that.

48 (C:) We sometimes treat clients like a piece of raw material, to be shaped and molded to suit our fancy. This is perhaps one of the major reasons why many of our efforts are unsuccessful or not more successful than they are.

49 (D:) I know I find myself occasionally thinking, "I know what's best for you." I know how I would feel if someone did that to me.

50 (C:) And you may even be right much of the time, but unless your client agrees with you, you may end up hitting your head against a stone wall.

51 (D:) Yes, but all my clients can't do what they want or be what they want to be. I have some who want to be race car drivers, pilots and things like that.

52 (C:) Most of us at one time or another have wanted to do or be something which is not likely to happen. The point is that regardless of a person's disability, everyone has a right to make choices. During evaluation, it's important to help the client become aware of different job possibilities so that the client can make decisions.

53 (D:) I agree with all of this, but how do you go about involving the client?

54 (C:) Well, it should start before the client even comes to the facility. It begins in the relationship between the client and his or her VR counselor in deciding on a referral. Once he comes here, he should be given a thorough orientation as to what he might expect from the staff and services of the facility. He should be given the opportunity to express his preferences and plans for the future. He should be provided with regular feedback about his performance during the evaluation.

55 (D:) We do these things now, but I know we could do better. Sometimes we don't even talk with the client before putting him or her to work out on the floor.

56 (C:) This shouldn't happen. We are all busy with our jobs, but it is very important that we take time to properly orient the client to our services. This is important with each and every client, and it is even critical with some. The initial contact can affect the client's attitude towards the facility and as a result, influence his or her entire program.

57 (D:) I guess we sometimes take this for granted, forgetting that it's the client's program in the first place.

58 (C:) We tend to get wrapped up in activities and techniques, and as a result, the individual client gets lost in the shuffle.

59 (D:) I don't think our "client orientation" would be too hard to change, if we put things in their proper perspective. The client should come first!

60 (C:) That's right. Client involvement requires real commitment from the very beginning and not just a token effort. It's one thing to say that you do it in theory, and quite another to make it an important part of your program.

61 (D:) You mentioned feedback to the client earlier; I don't think this would be that hard to improve on either.

62 (C:) It will take a conscious effort at first, and information has to be presented in a way in which it is useful to the client. It has to be more than just giving the results of work samples or test scores. There should be a natural flow of information exchange beginning during evaluation and continuing in work adjustment.

63 (D:) In other words, the client should understand how he has done, and what it may mean to him insofar as a job is concerned.

64 (C:) Yes, and the information should help him make choices as he goes along. This can tell you a great deal about the client as well as helping him learn a great deal about himself. This can eliminate a lot of problems for both of you.

65 (D:) Then the effects of client involvement are cumulative!

66 (C:) Absolutely! Evaluation and work adjustment are both part of the client's overall rehabilitation plan. Understanding this is very important in developing an effective adjustment plan. The client has been involved in formulating his or her own plan from the very beginning. There shouldn't be any surprises for him when he finishes the evaluation.

67 (D:) Since the client is involved in setting his own objectives for adjustment training, he probably will be more motivated to accomplish them than he would if he wasn't a participant.

68 (C:) This isn't going to provide a magical solution for all of your clients, but I think you will be much more effective than you are by simply going along with the way things have been.

69 (D:) Would it be possible to have the client participate in his own staffing conference?

70 (C:) That's a good idea! In fact, in one way or another, the client should participate. By the end of evaluation, the client should know what his or her problems are in relation to work. This should naturally lead into work adjustment.

71 (D:) Perhaps it might be good to give the client the choice, assuming that he or she would be given feedback and would still be involved in the decision-making process.

72 (C:) You're right. There are going to be some clients who prefer not to participate for one reason or another and their wishes should be respected. In such cases, you or someone the client chooses should represent his interests during the staffing conference.

73 (D:) I've heard that some facilities are having their clients sign their reports and adjustment plans to indicate that they are aware of what's going on and that they agree basically with the content of the report.

74 (C:) Yes, they are. This may seem superficial in some cases, but I think it's very healthy for the rehabilitation process. In fact, federal legislation requires that the rehabilitation plan be developed jointly by the VR

counselor and the client. Since you are VR's agent when they refer a client, this has implications for you also.

75 (D:) Maybe we should review our findings with the clients prior to writing our reports, and then go over the completed report with them prior to sending it to the referring counselor. We might even include a paragraph in the report summarizing the client's involvement in developing and implementing his or her own plan.

76 (C:) Those are good ideas. If the client has a voice in determining his or her own program and is involved in making decisions, the client should be motivated to accomplish the objectives that you have established together. This should be very helpful in increasing the prospects for a successful adjustment plan.

Discussion Questions:

What are you doing in your agency in order to involve the client? Is there an agency or program policy in this area, or is it left up to individual staff members? Are you familiar with rehabilitation legislation on this subject? Has the state vocational rehabilitation agency informed your agency of its policy in this matter? In addition to techniques mentioned, are there others which you have used or that you think may be helpful in increasing client involvement in the work adjustment plan?

77 (C:) So far we have talked about the importance of behavior identification and analysis, establishing priorities, frequency counts and baselines of behavior, and client involvement. All of these things are essential to developing a successful adjustment plan. We haven't necessarily discussed these in order of importance; in fact, if anything should be considered most important, it's client involvement, and that should be emphasized from the very beginning.

78 (D:) I imagine all of these things are equally important in that if you omit or de-emphasize one of them your plan is likely to suffer.

79 (C:) That's very possible. The point is that your client is going to have a better adjustment experience as a result of these methods. Now, I think we're ready to talk about objectives.

80 (D:) I've been thinking as we've been talking. I have an idea about what's wrong with the objectives we've been setting for our clients.

81 (C:) Good! Let's hear it.

82 (D:) Well, it relates to the principles of behavior identification that we talked about earlier. I think a lot of our objectives are too vague; we've been trying to improve things like motivation or self-concept. We should be dealing with specific behaviors and problems that we can observe. Our objectives for the client should be directed towards these same behaviors.

83 (C:) That's right! Your objectives should be based on the problem behaviors which you have identified during the evaluation. Objectives should also be written in observable terms so that you and the client know what he or she should be doing when the objective is reached. Once again, this is why it is important to establish a baseline of behavior during the evaluation which gives you an idea of whether or not the adjustment program is working.

84 (D:) In other words, if the client is late for work on the average of three days a week during evaluation, our objective would be to have the client arrive at work by 8:00 everyday.

85 (C:) Well, first of all, through behavior analysis you have to determine if this behavior is under the client's control. For example, it may be that the client is late because there is no transportation available which will get him or her here on time, or perhaps he or she doesn't know how to use an alarm clock. In other words, there may be some intermediate objectives for the client which lead to the objective of "arriving at work by eight o'clock."

86 (D:) I can see why client involvement is so important; I mean the client can provide information which can be useful in helping him or her achieve the objective.

87 (C:) That's right, and this can save both you and the client a lot of time and frustration. Getting back to your client who has difficulty arriving at work on time, before you establish an objective, you also have to look at other contingencies surrounding the behavior.

88 (D:) What else is there?

89 (C:) Well, how late is the client in the first place? In other words, it's an entirely different problem if the client is consistently 15-20 minutes late as compared to 2 or 3 minutes. If he or she is only a couple of minutes late, it may be a matter of simply talking with the client about

the problem. Also, is someone else contributing to the problem, another client or perhaps a parent? These are some of the things which you have to consider.

90 (D:) You really do have to be specific. I can see now why many of our adjustment plans haven't been successful.

91 (C:) Once you understand the need for behavior identification and analysis, you have taken the first step towards establishing a good work adjustment program. Even after you and the client agree on the objectives, there are other important considerations which can affect your plan.

92 (D:) We haven't talked about adjustment techniques or methods yet, and I can imagine these would be important to the success of the plan. Since we are now dealing with specific behaviors and objectives, I think this will help us develop a more specific treatment or work adjustment plan.

93 (C:) That's right. As a result of identifying and analyzing specific client behaviors, you will have a better idea of the objectives you want to accomplish. Your ideas for the techniques and methods to use in accomplishing them should also improve. As your objectives become more specific, your adjustment techniques will also become more specific to the problem. Different techniques including counseling, group counseling, behavior modification, modeling, and specific work assignments will be used according to the particular objective for the client.

94 (D:) Almost all of our clients receive counseling as part of their adjustment program. How can counseling be specific?

95 (C:) In lots of ways. Like other adjustment techniques, counseling should be geared towards assisting the client achieve his objectives. This will influence the frequency, method, and subject matter of counseling. The counselor's role may assume lesser or greater importance depending on the needs of the client as stated in the adjustment plan.

96 (D:) This brings up another point. Shouldn't a staff member be assigned responsibility for working with the client on each objective? I mean it's good to give the client responsibility, but the adjustment staff has to be responsible for the adjustment plan also.

97 (C:) That's a good point. Everyone should know who is to do what. This leads to improved communication and accountability. In this way, the client doesn't automatically become a scapegoat if the plan isn't effective. It may even be necessary and helpful to involve parents and husbands or wives.

98 (D:) How about a time element? You can't just go on indefinitely working on an objective, particularly if you don't see progress.

99 (C:) This is one of the real advantages that comes from establishing specific treatment objectives, work assignments, and methods using behavior identification as a basis. Since you are no longer working with vague generalities, you are in the position to establish realistic time lines for achieving your objectives. This gives the staff and the client something to strive for.

100 (D:) Even if the client doesn't always achieve the objectives within the time line, I imagine you both will have a better idea of how things are going. This should be helpful in evaluating and possibly revising the adjustment plan.

101 (C:) These principles are not going to guarantee a successful adjustment plan every time. The point is that the staff and the client will be able to tell whether or not the adjustment plan is working. As a result, there should be very few clients who are terminated from the program as not being feasible for services.

102 (D:) I see now how this should result in improved services to our clients. This will be good news to the rest of the staff and to VR.

103 (C:) The development of an individualized work adjustment plan is beneficial to everyone concerned. We're all in this together. This is why it's so important to have good communication between the staff, the client, the VR counselor, and everyone involved.

104 (D:) I can see that by utilizing these procedures communication should probably improve considerably.

105 (C:) It works both ways. Good communication is necessary for a successful adjustment plan regardless of which way you look at it. This means that the adjustment staff must keep each other informed; they must obtain from and provide regular feedback to the client; and they have to notify the VR counselor of any major changes in the adjustment plan.

106 (D:) Before you leave, let me see if I've got all this straight. First of all, you have to involve the client. Next, during evaluation you have to identify specific client behaviors in order to establish objectives for the adjustment plan. This involves obtaining a baseline of each behavior. Thirdly, you have to develop behavioral objectives written in observable terms. These should be stated so that you, the client, and others know what he or she should be doing

when the objective is accomplished. Next, you establish priorities and a time line for each objective. A staff member or staff members have to be assigned responsibility for assisting the client with each objective. The adjustment plan has to be reviewed frequently, to determine if you are on the right track. Finally, there has to be good communication.

107 (C:) Those are the major steps to establishing a good work adjustment plan. It will take some time and experience before you feel comfortable with all of them. However, you now have a model to follow. This should relieve your frustration as you begin seeing more clients complete a successful adjustment program.

108 (D:) Just knowing that there is something specific we can do helps a lot. I know that the rest of the staff will feel the same way.

109 (C:) You might consider some in-service training for the staff in work adjustment.

110 (D:) We have a lot of new staff members and we haven't kept up on our in-service training. It's my responsibility to see that the staff is trained to do their jobs. I'll see to it that we get in-service training going again, particularly in the area of work adjustment. There are a lot of new materials available, and perhaps you would be available to help us with this.

111 (C:) I would be glad to. Why not restaff the girl we talked about earlier in order to restructure her adjustment plan using the principles we've talked about. I think this would be very meaningful for the rest of the staff, as well as helpful to the client.

112 (D:) That's a good idea. I'll set it up and get in touch with you.

Conclusion and Discussion:

Take a look at the work adjustment program in your agency. You might start by reviewing the program description which appears in your agency manual and brochures. Does it mention any of the principles which are described in this discussion? Do you have a written, individualized adjustment plan for each client? Are objectives stated in terms so they can be agreed upon and easily recognized by different staff members.

Are the methods and techniques used in accomplishing objectives specifically described in the adjustment plan? Is a staff member assigned responsibility for assisting the client with each objective? Is the adjustment plan reviewed frequently? Is communication frequent and open between participants in the adjustment plan?

If your answers to the majority of the above questions are affirmative, your clients are probably already experiencing success in your work adjustment program. If not, after reviewing the discussion questions, you are likely to have a better idea of the areas where you need to improve. It will take some time and effort on your part in order to become proficient with these skills. Your commitment to improve your work adjustment program is a major step towards achieving this objective.

INDIVIDUALIZED WORK ADJUSTMENT PLAN

Case #_____

Client's Name_____ D.O.B._____ Voc. Eval. Dates_____to_____
Address_____ Soc. Sec. _____ Staffing Date _____
_____ Referring Person _____
_____ Work Adjustment Coordinator _____

Specific Behavior or Skill Deficit Frequency	Significance for Employment	Change Necessary	Change Helpful
1.	Rationale 1.	____	____
2.	2.	____	____
3.	3.	____	____
4.	4.	____	____
5.	5.	____	____

Individual Goal Sheet

Behavior:

Goal:

Intermediate Objectives
1.
2.
3.

Client Response:

Methods and Techniques:

Materials Needed:

Procedure: What Where Who

Progress Check Points

Date	Frequency	Achieving Objective		Program Change	
		Yes	No	Yes	No
_____	_____	___	___	___	___
_____	_____	___	___	___	___
_____	_____	___	___	___	___
_____	_____	___	___	___	___

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